



AppExchange Program
PARTNER

Product Pick Setup Guide

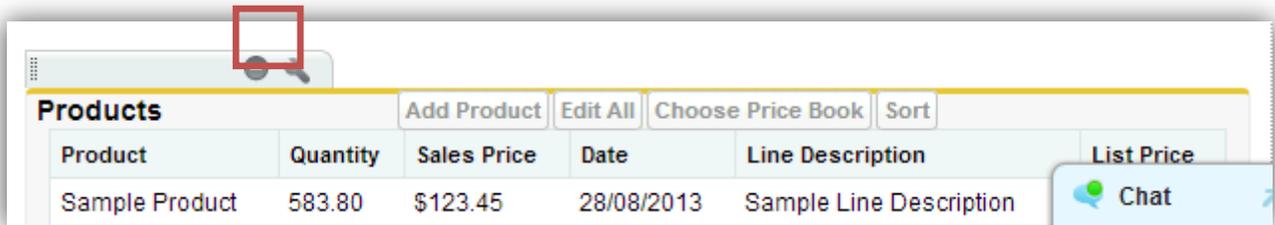
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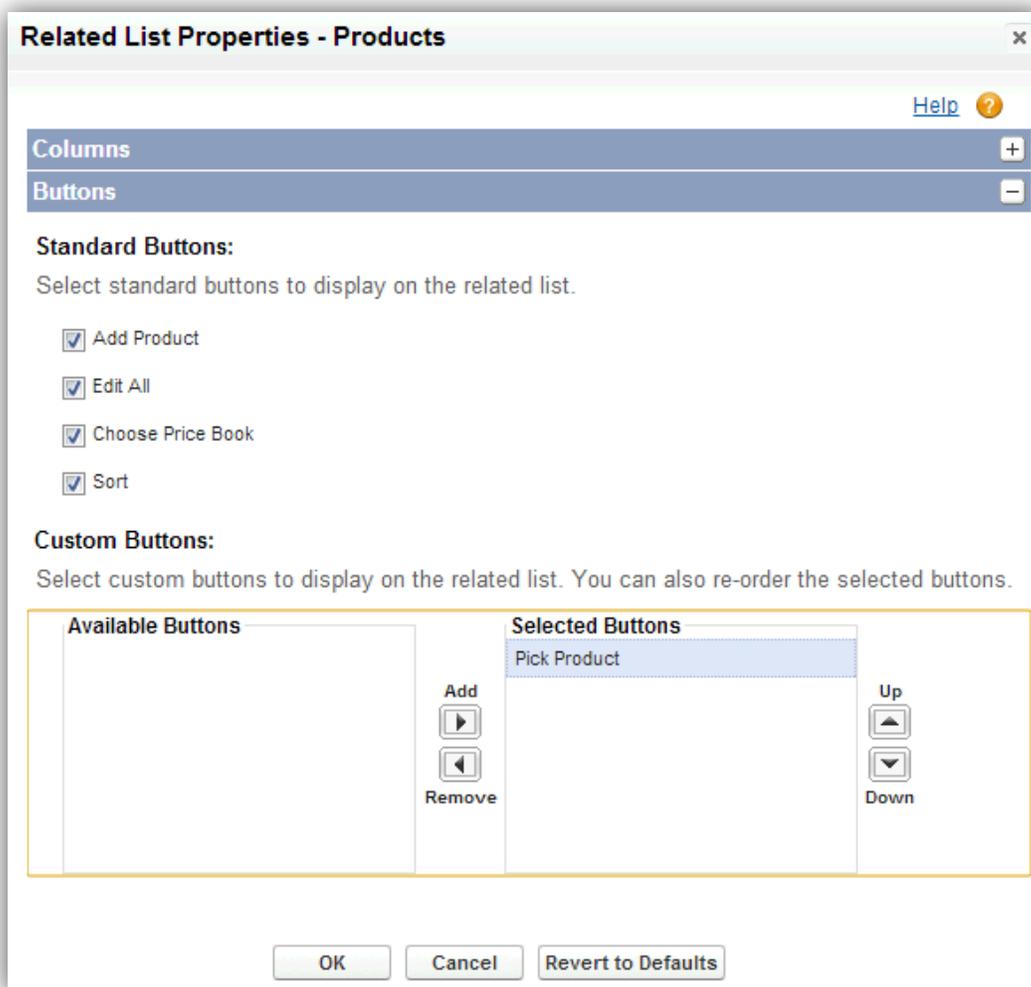
1. Add the Pick Product button:

Your salesforce.com admin will need to add the " Pick Product" button to all the page layouts for those using the app.

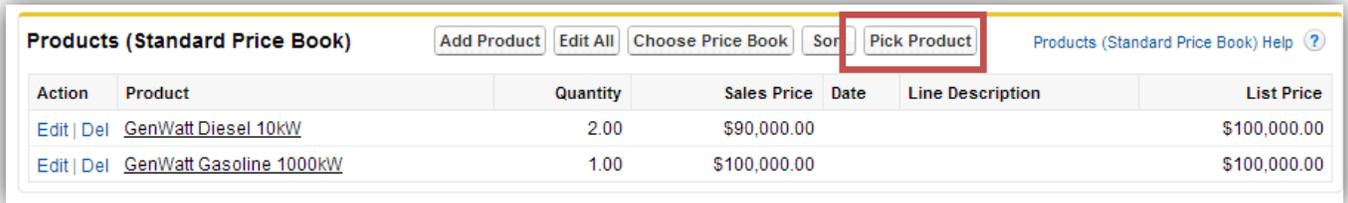
1. Setup | Customize | Opportunities | Page Layouts | Click Edit next to your layout
2. Scroll down to the Products related list



3. Scroll down to the Products related list and click the wrench icon to edit the Related List Properties of the Product list
4. Select the Pick Product button and Add



5. The Pick Product button will now be added



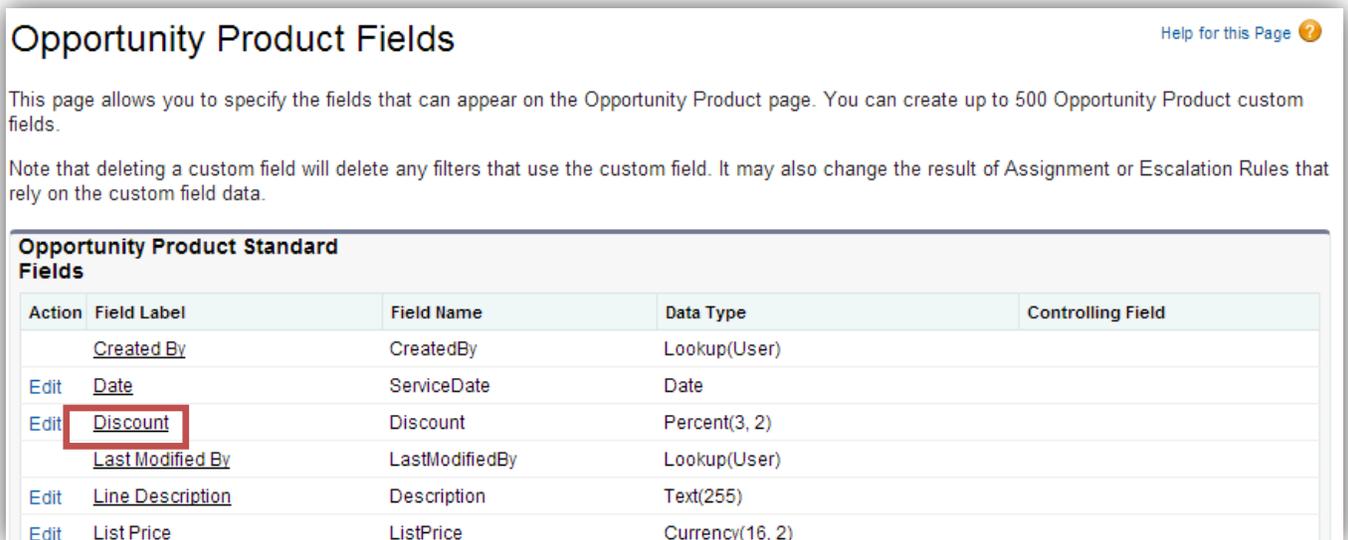
The screenshot shows a web interface for 'Products (Standard Price Book)'. At the top, there are several buttons: 'Add Product', 'Edit All', 'Choose Price Book', 'Sort', and 'Pick Product'. The 'Pick Product' button is highlighted with a red rectangular box. To the right of these buttons is a 'Help' link with a question mark icon. Below the buttons is a table with the following columns: Action, Product, Quantity, Sales Price, Date, Line Description, and List Price. The table contains two rows of product data.

Action	Product	Quantity	Sales Price	Date	Line Description	List Price
Edit Del	GenWatt Diesel 10kW	2.00	\$90,000.00			\$100,000.00
Edit Del	GenWatt Gasoline 1000kW	1.00	\$100,000.00			\$100,000.00

2. Security Permissions:

If you're using Enterprise Edition, it's important that your users have access to the following in their Profile

1. Click Your **Name** | **Setup** | **Customize** | **Opportunities** | **Opportunity Products** | **Fields** | **Edit Discount**



The screenshot shows the 'Opportunity Product Fields' page. The title is 'Opportunity Product Fields' and there is a 'Help for this Page' link with a question mark icon. Below the title is a paragraph explaining that the page allows specifying fields for the Opportunity Product page, with a limit of 500 custom fields. A note states that deleting a custom field will delete any filters that use it and may change the result of Assignment or Escalation Rules. Below this is a table titled 'Opportunity Product Standard Fields' with columns: Action, Field Label, Field Name, Data Type, and Controlling Field. The 'Discount' field is highlighted with a red box.

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatedBy	Lookup(User)	
Edit	Date	ServiceDate	Date	
Edit	Discount	Discount	Percent(3, 2)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Line Description	Description	Text(255)	
Edit	List Price	ListPrice	Currency(16, 2)	

2. Click Set Field-Level Security

Opportunity Product Field Help for this Page ?

Discount

[Back to Opportunity Product Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Discount	Field Name	Discount
Data Type	Percent(3, 2)		
Help Text			

Validation Rules [New](#) [Validation Rules Help ?](#)

No validation rules defined.

3. Give users visibility to Discount field to the profiles by checking the box next to the profiles that will be picking products.

Set Field-Level Security Help for this Page ?

Discount

[Save](#) [Cancel](#)

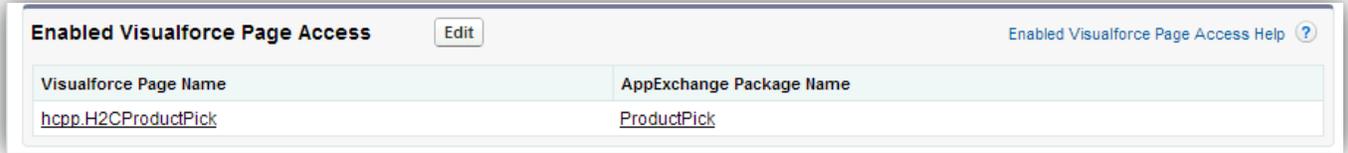
Field Label: Discount

Data Type: Percent(3, 2)

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. Click Your Name | Setup | Administration Setup | Manage Users | Profile | Select the profile of your users | Enabled Visualforce Page Access | Edit | Add the following pages:

- hcpp.H2CProductPick



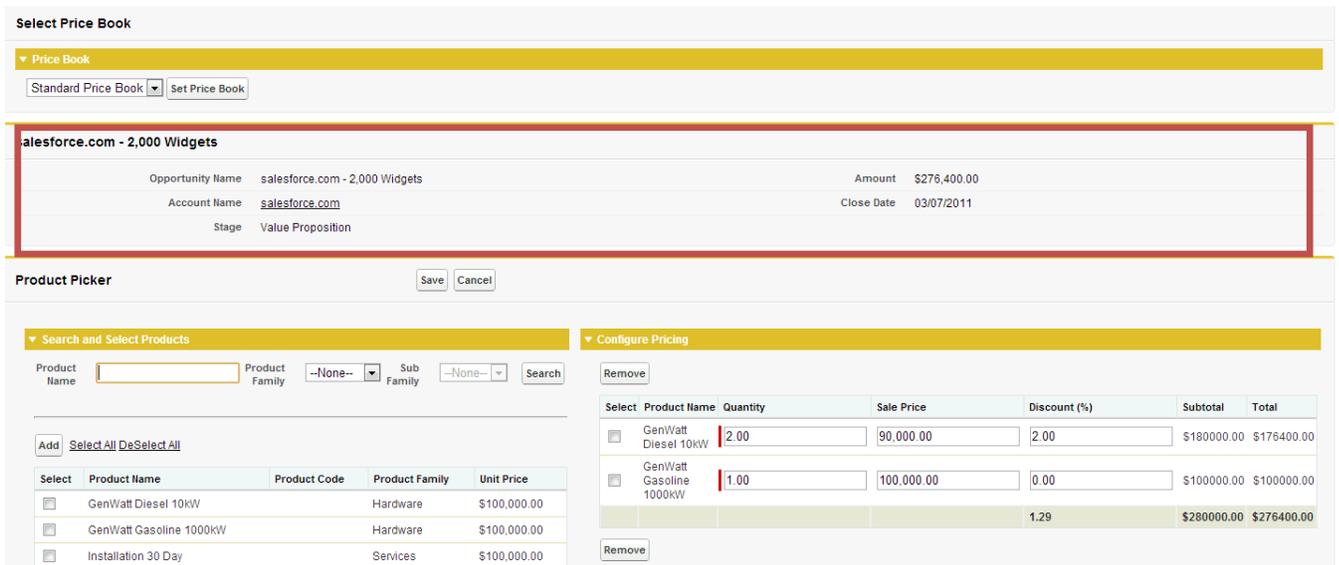
3. Configuring the Fields on the Product Pick Page

You can configure the fields on the Product Pick page. There is a standard set of fields you can add/remove or you can create your own custom fields from the opportunity, opportunity line items and product objects

i.e. For your sales teams add the product description field to make it easier for them to select products. Or add the date field to the product editing grid.

1. Setup | Customize | Opportunities | Field Sets | Click Edit ProductPick Opportunity FS. Then click and drag fields from the meeting object down into your field set.

- ProductPick Opportunity FS: This controls the fields that appear on the picker screen about the original opportunity



2. Setup Setup | Customize | Opportunities | Opportunity Products | Field Sets | Click Edit ProductPick OLI FS. Then click and drag fields from the meeting object down into your field set.

- ProductPick OLI FS: This controls the fields that appear on the Configure pricing grid

Select Price Book

Price Book: Standard Price Book [Set Price Book]

salesforce.com - 2,000 Widgets

Opportunity Name: salesforce.com - 2,000 Widgets Amount: \$276,400.00
 Account Name: salesforce.com Close Date: 03/07/2011
 Stage: Value Proposition

Product Picker [Save] [Cancel]

Search and Select Products

Product Name: [] Product Family: --None-- Sub Family: --None-- [Search]

Add [Select All] [DeSelect All]

Select	Product Name	Product Code	Product Family	Unit Price
<input type="checkbox"/>	GenWatt Diesel 10kW		Hardware	\$100,000.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW		Hardware	\$100,000.00
<input type="checkbox"/>	Installation 30 Day		Services	\$100,000.00

Configure Pricing

Select	Product Name	Quantity	Sale Price	Discount (%)	Subtotal	Total
<input type="checkbox"/>	GenWatt Diesel 10kW	2.00	90,000.00	2.00	\$180000.00	\$176400.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW	1.00	100,000.00	0.00	\$100000.00	\$100000.00
				1.29	\$280000.00	\$276400.00

3. Setup | Customize | Products | Field Sets | Click Edit ProductPick Product Available FS. Then click and drag fields from the meeting object down into your field set.

ProductPick Product Available FS: This controls the fields that appear available to be selected

Select Price Book

Price Book: Standard Price Book [Set Price Book]

salesforce.com - 2,000 Widgets

Opportunity Name: salesforce.com - 2,000 Widgets Amount: \$276,400.00
 Account Name: salesforce.com Close Date: 03/07/2011
 Stage: Value Proposition

Product Picker [Save] [Cancel]

Search and Select Products

Product Name: [] Product Family: --None-- Sub Family: --None-- [Search]

Add [Select All] [DeSelect All]

Select	Product Name	Product Code	Product Family	Unit Price
<input type="checkbox"/>	GenWatt Diesel 10kW		Hardware	\$100,000.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW		Hardware	\$100,000.00
<input type="checkbox"/>	Installation 30 Day		Services	\$100,000.00

Configure Pricing

Select	Product Name	Quantity	Sale Price	Discount (%)	Subtotal	Total
<input type="checkbox"/>	GenWatt Diesel 10kW	2.00	90,000.00	2.00	\$180000.00	\$176400.00
<input type="checkbox"/>	GenWatt Gasoline 1000KW	1.00	100,000.00	0.00	\$100000.00	\$100000.00
				1.29	\$280000.00	\$276400.00

4. Setup | Customize | Products | Field Sets | Click Edit ProductPick Product Search FS. Then click and drag fields from the meeting object down into your field set.

ProductPick Product Search FS: This controls the fields that are used for searching

Select Price Book

Price Book: Standard Price Book [Set Price Book]

salesforce.com - 2,000 Widgets

Opportunity Name: salesforce.com - 2,000 Widgets Amount: \$276,400.00
 Account Name: salesforce.com Close Date: 03/07/2011
 Stage: Value Proposition

Product Picker [Save] [Cancel]

Search and Select Products: Product Name [] Product Family [--None--] Sub Family [--None--] [Search]

Configure Pricing: [Remove]

Select	Product Name	Quantity	Sale Price	Discount (%)	Subtotal	Total
<input type="checkbox"/>	GenWatt Diesel 10kW	2.00	90,000.00	2.00	\$180,000.00	\$176,400.00
<input type="checkbox"/>	GenWatt Gasoline 1000kW	1.00	100,000.00	0.00	\$100,000.00	\$100,000.00
				1.29	\$280,000.00	\$276,400.00

Product Picker Table:

Select	Product Name	Product Code	Product Family	Unit Price
<input type="checkbox"/>	GenWatt Diesel 10kW		Hardware	\$100,000.00
<input type="checkbox"/>	GenWatt Gasoline 1000kW		Hardware	\$100,000.00
<input type="checkbox"/>	Installation 30 Day		Services	\$100,000.00

4. Update Product Pick to latest version

1. Go to <https://appexchange.salesforce.com/>
2. Click on Login at the top of the page
3. Enter your salesforce.com credentials to log into the salesforce.com appexchange
4. Select your name at top of page>My Account

My Account - Hitch2Cloud

Show: All My Company's Apps [View all apps that are currently installed or were bought on the AppExchange.]

Apps listed: Hitch2Cloud Connector Standard of GoToMeeti..., Recurly - Subscription Billing To Salesforce..., License Management App (L..., Salesforce.com Channel Ord...

User Profile: Dennis Lee (dennis@hitch2cloud.com)

- My Activity
- Questions
- Answers
- Ideas
- Reviews
- My Account** (highlighted)
- Edit My Profile
- Publishing Console
- Logout

5. Select update for the Product Pick package



My Account - Hitch2Cloud

Show: *View all apps that are currently installed or were bought on*



Product Pick

Status: Installed - Free

[Write Review](#) - [Uninstall App](#)



Update Available

5. Contact Us

Website: <http://hitch2cloud.com>

Email: info@hitch2cloud.com

